

Are you reaching your goals?

Q1 Milestone Focus

DEADLINE _____

Q2 Milestone Focus

DEADLINE _____

Q3 Milestone Focus

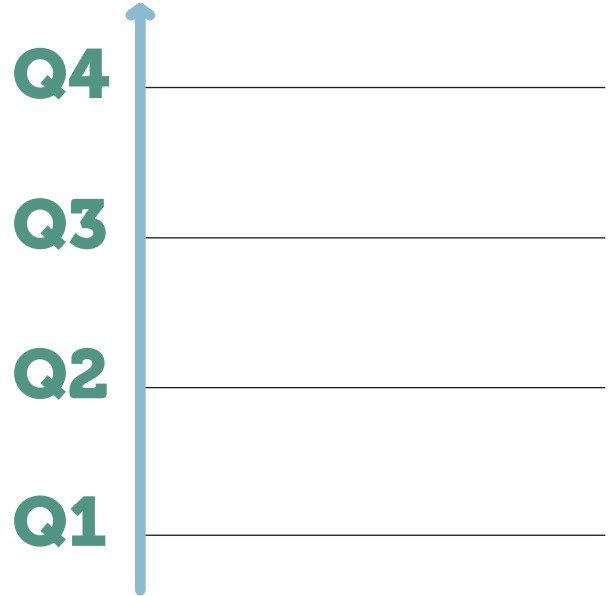
DEADLINE _____

Q4 Milestone Focus

DEADLINE _____

Annual Goal

NNA > REV > AUM



Fundamental 4

STRATEGIC PLANNING

Business Plan
Succession Plan
Compensation
Incentive Plan
Business Model
Investment Model
Operating Costs
Peer Alliances

BUSINESS DEVELOPMENT

Branding & Value Proposition
Niche Marketing
Prospecting
Referral Network
Marketing Plan
Client Advisory Boards
Client Appreciation
Sales Effectiveness

OPERATIONAL EFFECTIVENESS

Client Segmentation
Service Matrix
New Client Onboarding
Staff Meetings
Technology
Existing Client Workflow
Reports & Tracking
Systems
Time Management

HUMAN ELEMENT

Job Descriptions
Hiring & Onboarding
Culture
Career Path
Performance Feedback
Communication
Culture
Leadership
Team Development